RESEARCH HIGHLIGHTS

June 2002 Socio-economic Series 103

SUSTAINABLE COMMUNITY PLANNING AND DEVELOPMENT: DESIGN CHARRETTE PLANNING GUIDE

Introduction

Design charrettes are becoming an increasingly popular part of the urban planning process. They bring together a diverse range of expertise—such as architects, landscape architects, engineers, planners, content specialists, educators, students, community representatives, governmental staff and civic leaders—to collaborate on creating innovative design solutions that embody multiple objectives and mutual interests. Design charrettes give visual form to ideas and policies and are effective in generating creative solutions to difficult problems in the least amount of time. Typically, a design charrette lasts three to four days and involves the same logistical work as required in planning a conference.

All too often, buildings, sites, neighbourhoods, communities and regions have been planned or even zoned according to policies and codes with little visual or contextual input. Planning decisions are argued on a case-by-case basis in what is, for the most part, an adversarial hearing process. Such approaches are counterproductive to sustainability planning, which requires tools that deliver a holistic, strategic and integrated planning approach.

Design charrettes are one such tool. They provide a forum for diverse groups of participants to explore, understand, create and evaluate possible and preferred options. They encourage discussion beyond conventional thinking, and can address the opposition so often typical of conventional planning and zoning proposals. Charrettes, which are often linked to larger planning initiatives, help to build consensus and inspire community initiative and ownership in development planning.

Done well, a charrette can

- increase community learning about complex issues
- evoke greater understanding and support of plans
- inspire greater involvement in furthering the journey towards creating and maintaining sustainable communities

A sustainable community design charrette focuses on specific issues and details of a given site in relation to the surrounding community and ecosystem, using the broad concepts and goals of sustainability to focus and guide discussions.

CMHC SCHL

HOME TO CANADIANS

Canada

62779

Sustainable Community Planning Design Charrettes

Charrettes offer a holistic, integrated approach for addressing a complex set of issues:

- land use
- transportation
- public and private space
- density
- mobility
- urban form
- resource use (materials, energy, water, finances)
- waste generation and handling
- marketability, aesthetics

Other activities can be useful precursors to a full charrette, or even serve in place of one. Community planning forums, design assistance teams, discussion forums, expert panels, multi-stakeholder brainstorming sessions, open houses and participatory mapping exercises are a few examples. These are particularly useful when budget, time or other constraints prohibit a full-scale charrette.

A sustainable community design charrette is no small undertaking. A multitude of issues must be addressed and decisions made. Charrettes require considerable preparatory and follow-up work, as well as significant resources, especially in terms of people.

To assist with this work, Canada Mortgage and Housing Corporation (CMHC) funded the development of a guide for those who are interested in hosting or otherwise initiating a sustainable community planning design charrette. *Sustainable Community Planning and Development: Design Charrette Planning Guide* covers the four phases involved in planning, organizing and holding a charrette: 1) the work that needs to be done before even committing to a charrette; 2) the advanced planning and logistical arrangements to be made; 3) the event itself, from on-site signage and registration to setting the tone and handling predictable challenges; and 4) post-event reporting. The guide also provides a summary of the concepts and issues relevant to sustainable development, sustainable communities and design charrettes in general.

For those interested in a fuller discourse on sustainable community planning, CMHC's *Sustainable Community Planning: Participation Tools and Practices* serves as a good companion document. This guide is summarized in CMHC's *Research Highlight* February 2001, Socio-economic Series, Issue 97.

The four phases

Beginning the journey

Before committing to a charrette, or seeking support or approval, you need to do some homework. You must be familiar with the charrette approach and the concepts of sustainable community planning, and you need to know who are likely to be the key decision makers, your potential allies and the resources required. You will need to demonstrate how a charrette will contribute to creating a better community, make your municipality more prosperous, respond to community interests, address specific problems related to a site, enhance sponsor's credibility or speak to other key interests.

Keep in mind that charrettes are resource intensive and that they tend to involve important projects, which means they attract attention and can become politically sensitive.

This section of the guide will help you build support for a charrette and develop a formal proposal. It also includes three readiness assessments, such as the one shown here. These assessments are useful in determining where you are at in the early stages of the process and if you are ready to proceed to the next step.

Readiness Assessment 1:

Are you in a position to initiate broader exploration of the charrette idea, for example, are you a key decision maker or a sponsor?

Do you know who your allies might be or where you might begin building support?

Is it likely that the organization and its members may be open to the idea?

Do you have some confidence that resources are available or could be obtained?

- If your answers tend to be "yes", you're ready for the next step.
- If you are uncertain, it's time to do some more homework and exploration.
- If you answered "no" to one or more of the questions, it's time to do a bit more thinking and planning and/or choose an activity other than a charrette.

Pre-charrette planning

This phase involves outreach, communications with people directly and indirectly involved in the charrette, business relations management, research, document preparation, program development, team selection and lots of nitty-gritty tasks—drafting contracts, venue arrangement, food planning, organization of on-site supplies and equipment, transportation and accommodation for outside visitors, and more. It may also include various planning meetings, mini-design workshops or other orientation and planning events. These can be used both to inform the charrette and to expand interest and involvement in the planning process beyond charrette participants.

Failure to inform various stakeholders and interested parties, or otherwise provide them with some form of connection to the charrette, can result in damaged relationships and questions regarding the appropriateness and credibility of the charrette, its organizers and the results.

A charrette focused on sustainability will likely be broad in scope. The consultants and facilitators engaged for the event must represent many disciplines, including process expertise as well as technical knowledge. The specific scope and terms of reference for a charrette should be specified clearly and succinctly.

The *Design Charrette Planning Guide* discusses major design issues—natural systems, built form and infrastructure—and their sub components. It notes that a design brief or program, which is provided to participants in advance of the event, should be organized around social, economic and regulatory design issues, or other issues such as land and water, the built environment, building design and performance, and cycles of growth and decay.

Suggestions regarding logistical arrangements and a discussion of predictable challenges complete this chapter. The guide provides a detailed sample list of supplies and equipment to have on hand at a charrette, as well as a pre-charrette readiness assessment checklist.

The charrette event

Next, the guide discusses the event itself in considerable detail. This section begins with some of the physical arrangements to consider, such as directional and welcoming signage, food and supplies. It discusses what you need to achieve in the first session, the tone that should be set for the event and how it could be achieved. The guide also provides insight on how to structure the sessions and the required documentation.

An important goal in the first session is to establish a common understanding of the scope and process for the charrette. Opening presentations should cover the following aspects: some general background information regarding the events and work that preceded the charrette; a review of the design brief and performance criteria; an explanation of the process and timing for the rest of charrette; and mention of the final deliverables anticipated. This first session is also an opportunity for all participants to learn a little about each other.

You should expect the main part of the event, the design sessions, to be characterized by uncertainty, creativity and chaos. Some people, particularly those new to charrettes, may become anxious about results or worry about the process falling apart. The guide offers advice on the flow and structure of activities, and it provides some insight on what to expect in the way of confusion and how to handle predictable challenges.

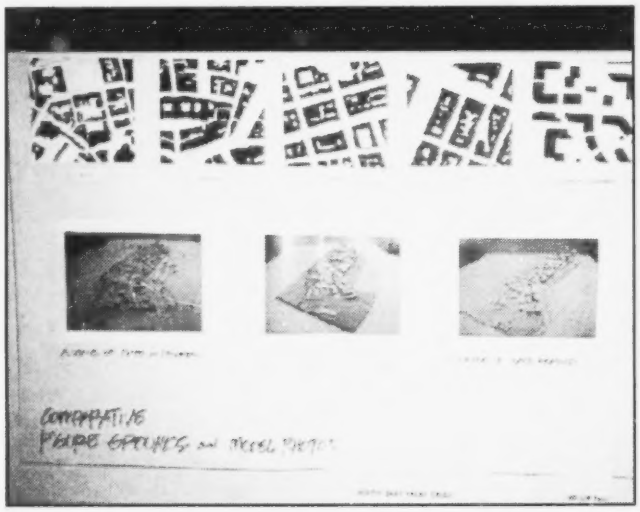
Post-charrette: managing and maximizing the aftermath

In the post-event phase, a key goal is to get information about the charrette out to stakeholders and other interested parties as soon as possible. This may be accomplished by way of quick update notes or initial posts to a project Web site. These communiqués help maintain interest and momentum, and they forestall frustrations about potential reporting delays.

Two reports should be issued, a preliminary one and a final report. The suggested content for the first includes the following items: short descriptions of the project, the process, the site (with a map), the charrette event, its

purpose and goals, who participated and how the teams were chosen; the text from the design brief; a summary of each team's design, with some key visuals included; a summary of the key themes and ideas that emerged; and concluding remarks on how the results will be used and the next steps in the project. This preliminary report should be completed and presented to key stakeholders as soon as possible.

The final report should also be completed and distributed to all interested parties as quickly as possible. It will build on and extend the content of the previous report, going into more detail on such aspects as the rationales for the charrette, conclusions and individual team reports. The latter should include all relevant visuals and discussions of technical issues.



Access to these results, including various data sets and drawings, by sponsors, participants, stakeholders, observers, the media and residents is critical. Following the release of these two reports, analysis and assessment of various options will likely occur for some time to come. The process must continue to be very transparent. It is important to remember that charrette results are ideas for further exploration and discussion, not endpoints in the process. In the end, how you use the ideas and momentum generated by a charrette will determine the long-term benefits.

More guidance

Three appendices provide additional help and information. The first presents the various checklists found throughout the main body of the guide. These checklists will help you with determining whether you are ready to move ahead, selecting team members, preparing briefing packages, logistical arrangements and preparing the preliminary and final reports. The second appendix presents a sample design brief in detail, along with sample cheat sheets pertaining to design objectives, performance thresholds and quantities. A sustainable urban development issues matrix, in the third appendix, provides guidance on how to focus discussions and exploration of ideas.

Conclusion

Design charrettes are a powerful tool for bringing together diverse interests and disciplinary expertise to explore options and generate visual ideas and potential solutions. They encourage discussion beyond conventional thinking. They can be an effective means for testing policies and the feasibility of design solutions that speak to multiple objectives and interests. They can also inspire and catalyze community-wide co-operation and commitment.

To be successful, though, a design charrette requires extensive planning, outreach, expert resources and time. The *Design Charrette Planning Guide* is a comprehensive resource book for anyone who plans to undertake a charrette or is in the process of holding one. It is also an interesting source of information on the principles and issues of sustainable community planning, and their relationship to charrette events for anyone participating in a charrette. Wherever you are at in the process, this guide will give you much insight into sustainable community planning issue areas, the benefits of a charrette, how to proceed and what to expect.

CMHC Project Manager: Douglas Pollard

Research Report: *Sustainable Community Planning and Development Design Charrette Planning Guide, 2001*

Project Leader and Author: Fiona S. Crofton, ORCAD Consulting Group Inc.

Contributer: Mark E. Holland, Mark E. Holland Consulting

Case Research Assistant: Patrick Yuen, University of British Columbia Civil Engineering Student

Housing Research at CMHC

Under Part IX of the *National Housing Act*, the Government of Canada provides funds to CMHC to conduct research into the social, economic and technical aspects of housing and related fields, and to undertake the publishing and distribution of the results of this research.

This fact sheet is one of a series intended to inform you of the nature and scope of CMHC's research.

To find more *Research Highlights* plus a wide variety of information products, visit our Web site at

www.cmhc.ca

or contact:

Canada Mortgage and Housing Corporation
700 Montreal Road
Ottawa, Ontario
K1A 0P7

Phone: 1 800 668-2642
Fax: 1 800 245-9274

OUR WEB SITE ADDRESS: www.cmhc-schl.gc.ca

Although this information product reflects housing experts' current knowledge, it is provided for general information purposes only. Any reliance or action taken based on the information, materials and techniques described are the responsibility of the user. Readers are advised to consult appropriate professional resources to determine what is safe and suitable in their particular case. CMHC assumes no responsibility for any consequence arising from use of the information, materials and techniques described.